COMPLETE PAYROLL SOLUTIONS

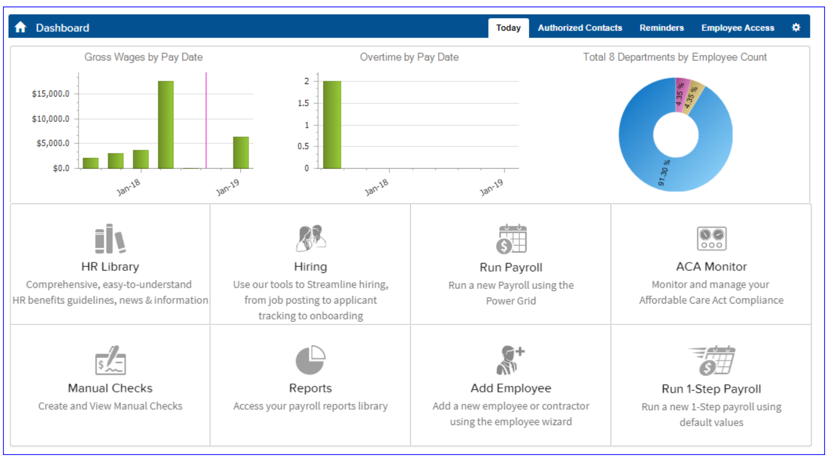
PlatinumPay Xpress

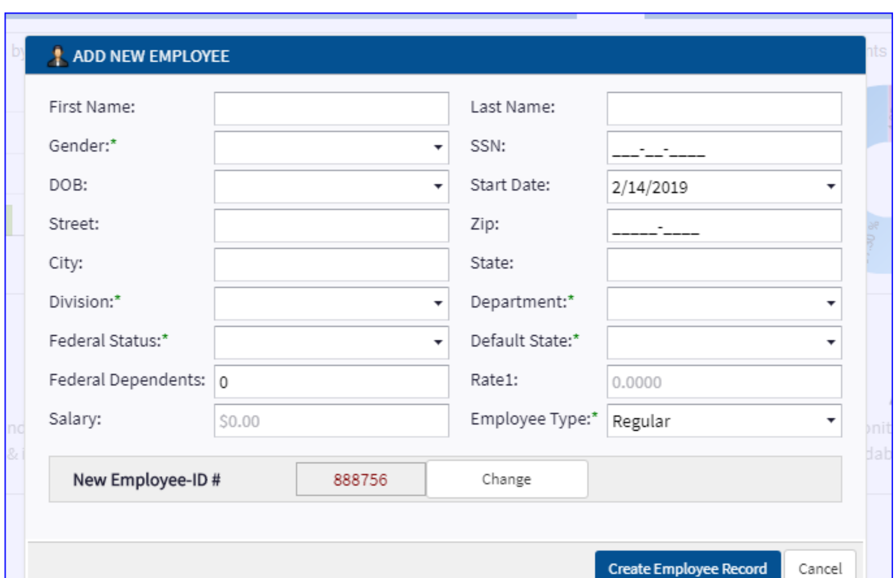
Adding a New Employee

Contents

Adding New Employee from Dashboard

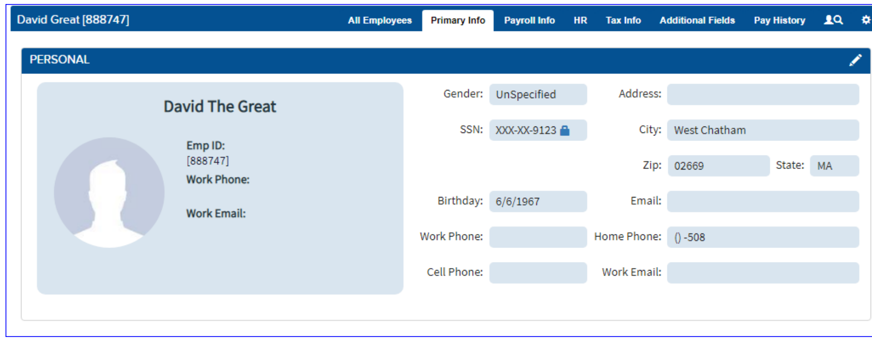
When selecting the Add Employee tile from the dashboard a quick set up will appear requesting employee information. All fields are required to process payroll accurately.

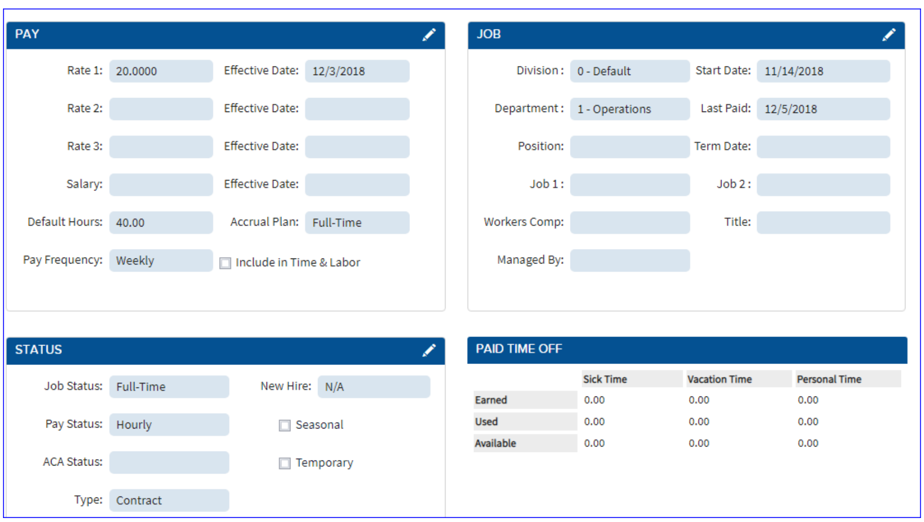




Primary Info

- Personal
- Status
- Pay
- Notes
- Reminders
- Paid Time Off





Primary info has six tiles you can edit from it will allow you to make changes to the employees profile.

Personal Tile: Name, gender, contact info, DOB, SSN and photo if desired.

Status: You're going to find full time, part time status, pay type, ACA and seasonal/temporary fields.

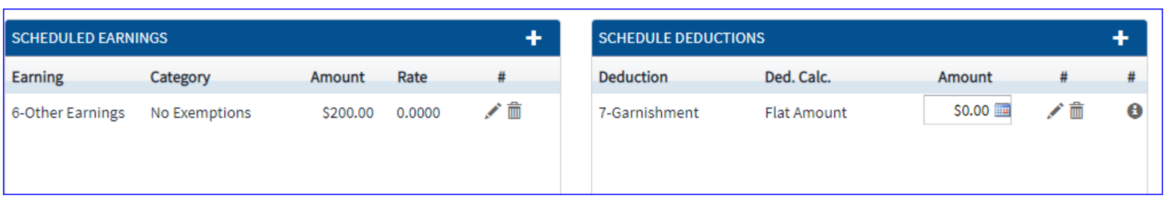
Pay: Employee will either be hourly or salary. And from here select pay frequency; weekly bi-weekly, monthly…

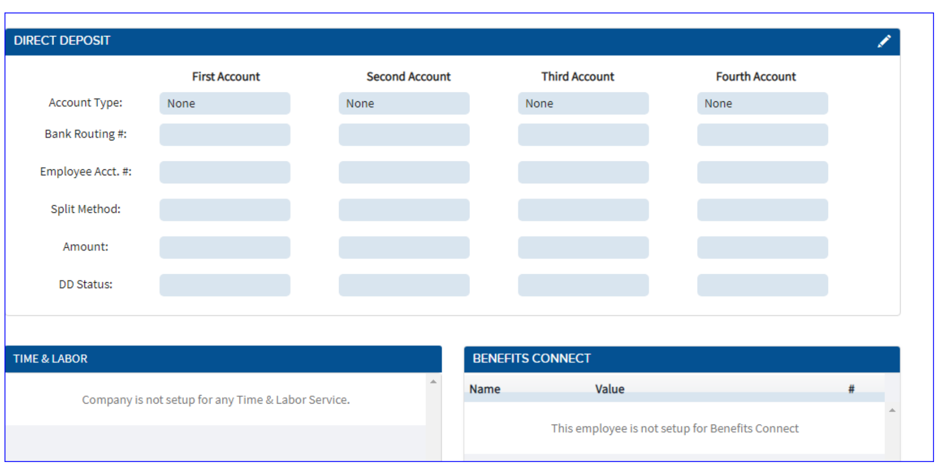
Job: Here you can set up/change divisions, departments, start and termination dates

Paid Time Off: You'll notice tracking for vacation/sick or PTO days, however accruals will need to be set up on the client level first.

Payroll Info

- Scheduled Earnings
- Scheduled Deductions
- Direct Deposit
- Time & Labor



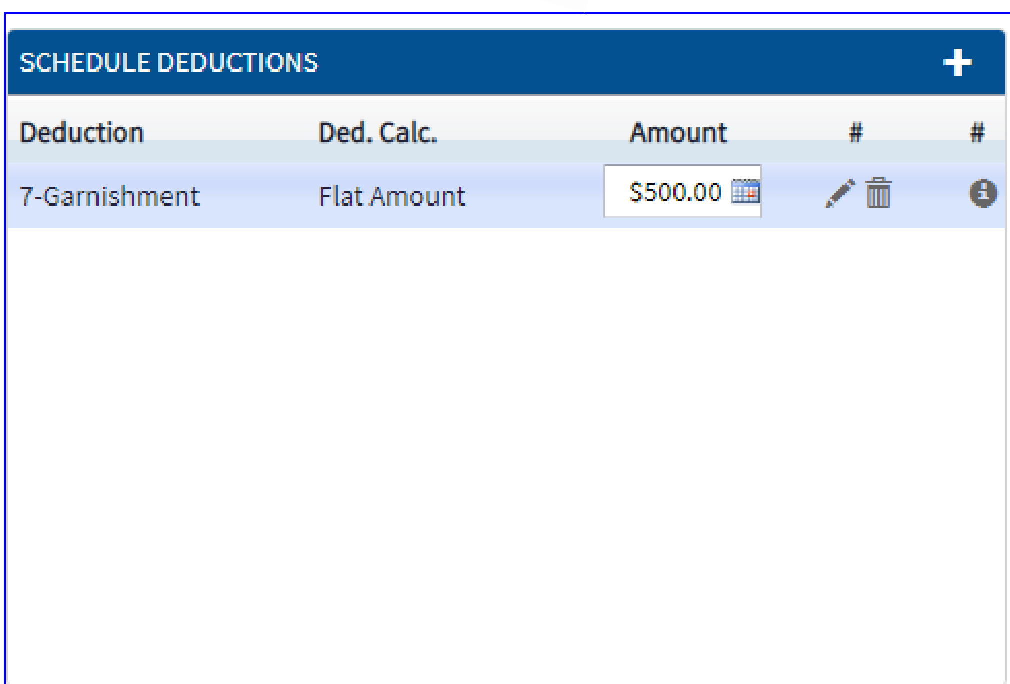


Scheduled earnings code, this is where you would want to describe the type of pay the employee is receiving. A good example would be your w4 employee would be classified as regular pay where as a contractor could be set up as a 1099 pay code. Pay codes can be created to what-ever you'd like they would first be created on the client level first which the payroll specialist would take care of first.

SCHEDULED EARNINGS +

Earning	Category	Amount	Rate	#
6-Other Earnings	No Exemptions	$200.00	0.0000	

- Scheduled Deductions, this area will allow you to select different deductions and deductions can either be voluntary (health, medical/dental, 401K) and also involuntary deductions (Levy's, child support or other types of garnishments.) This section is also created on the client/employer level first once it's complete options will become available for the employee.
  >Select type of deduction
  >select type of calculation for deduction: Percent/Flat amount
  >select amount: whole dollar amounts or percentages ie: 401K can either be flat amount of $100.00 per pay period or 3% of gross which would be .03
  And don't forget to save progress.

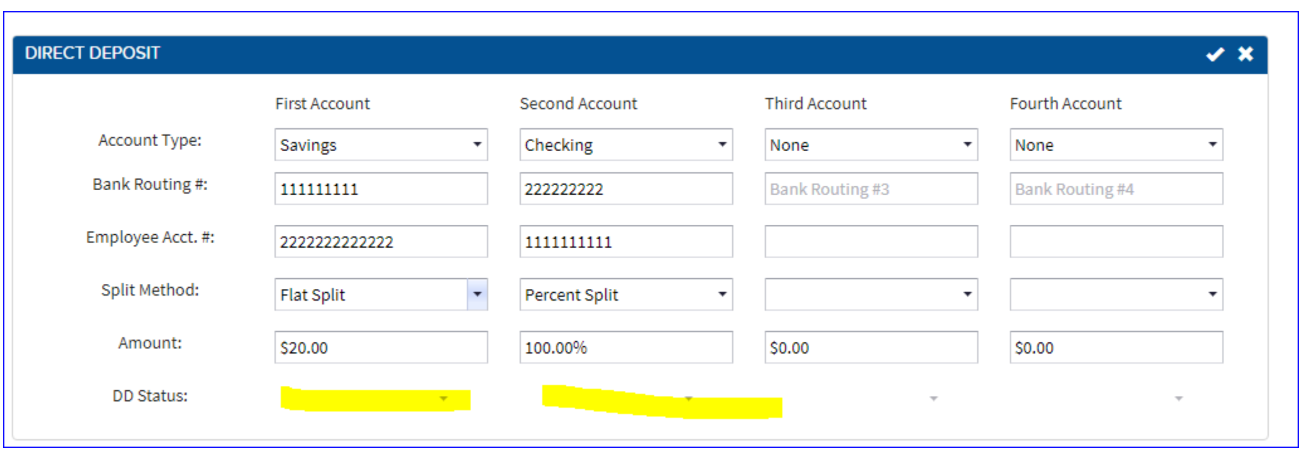


Direct Deposit: Employees can have up to 4 direct deposit accounts on file. Preferred order for deposits should be smallest to largest and always last account should be remaining 100%

Example: 1^{st} savings \$20, 2^{nd} 100% – thhe remaining needs to be 100% of what's left over from the paycheck. If they are selected for percent, those rules would follow as well

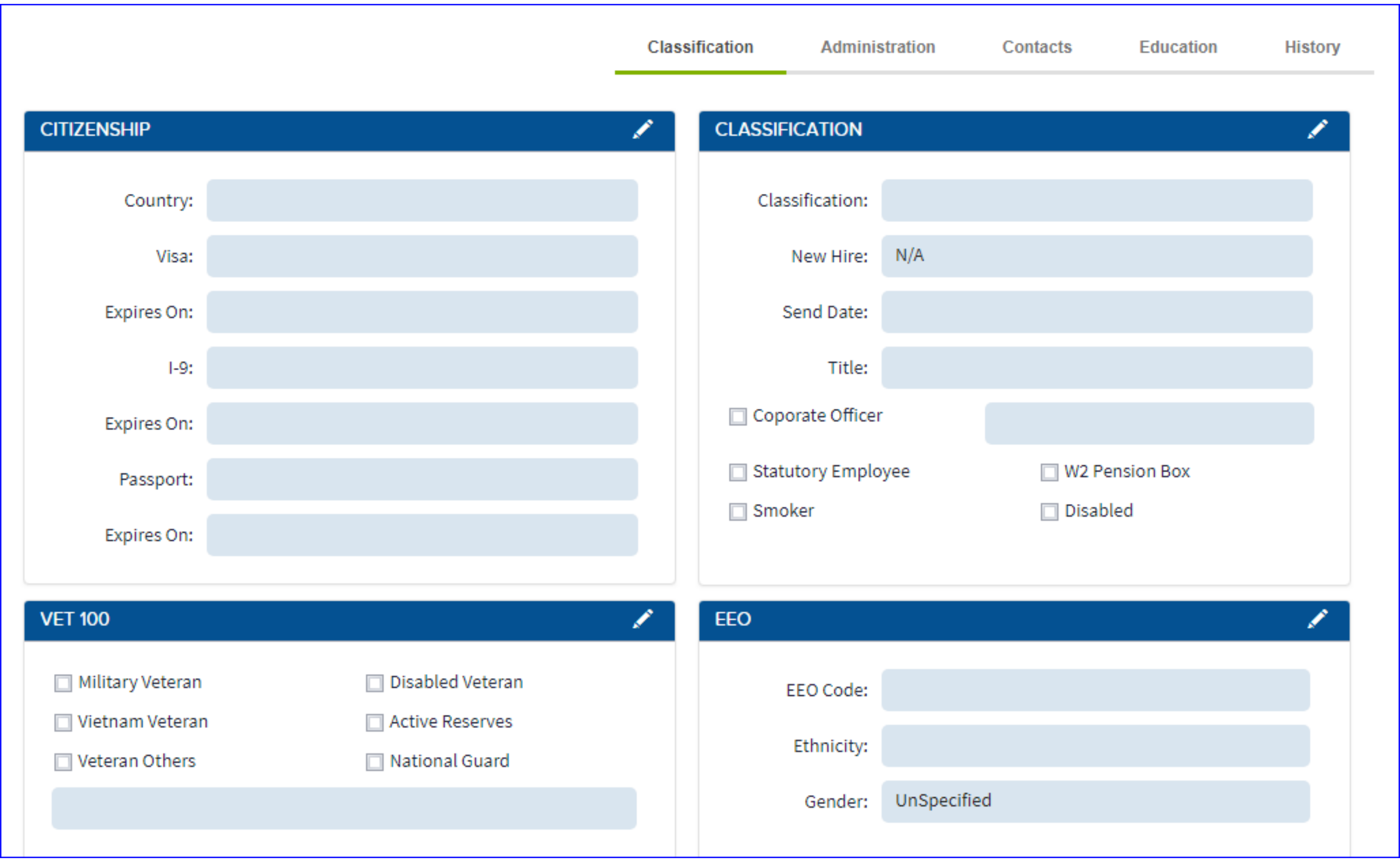
1^{st} checking 5% 2^{nd} 90% 3^{rd} 4% 4^{th} always 100% of what's left over.

* Please follow up with payroll specialist to activate direct deposits*

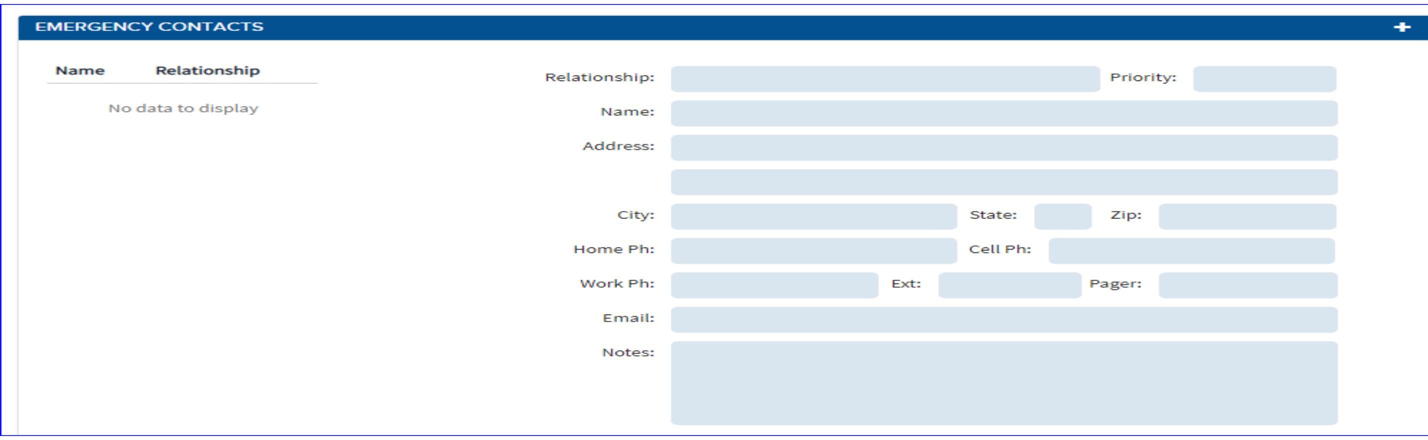


HR

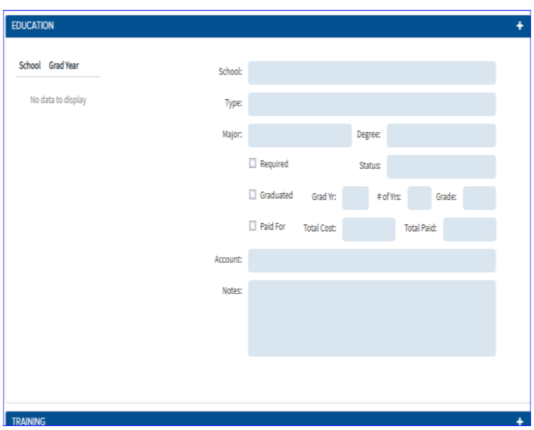
This splits into sub tabs; Classification, Administration, Contacts, Education, History. This serves as an HR resources to keep information the employer may seem vital to the employee.

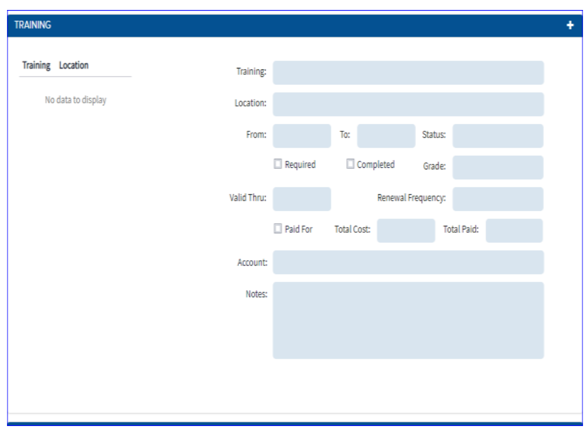


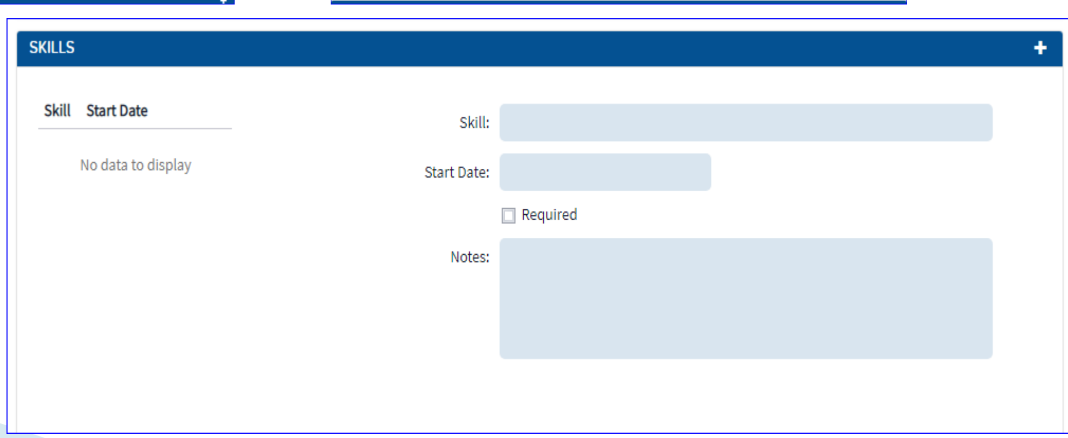
HR



- The Education Tab has three tabs with in; Education, Training, Skills

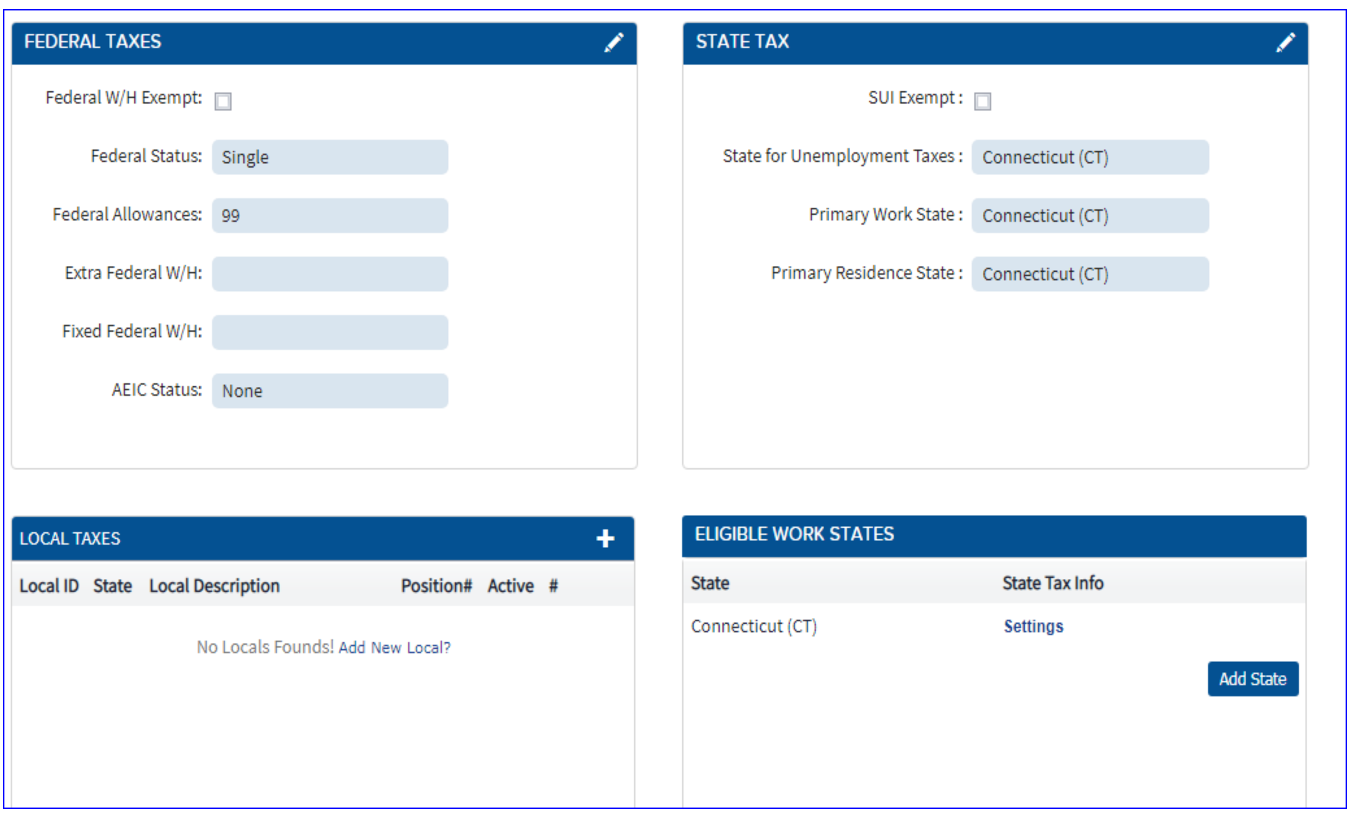






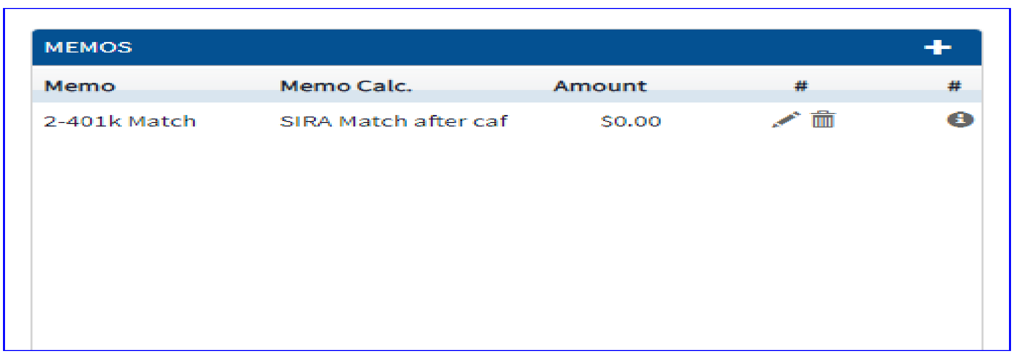
Tax Info

This is where the federal, state, local and any eligible work states will be set up. Eligible work states have to be set up via our tax department, after the company has set up an account with that particular state.

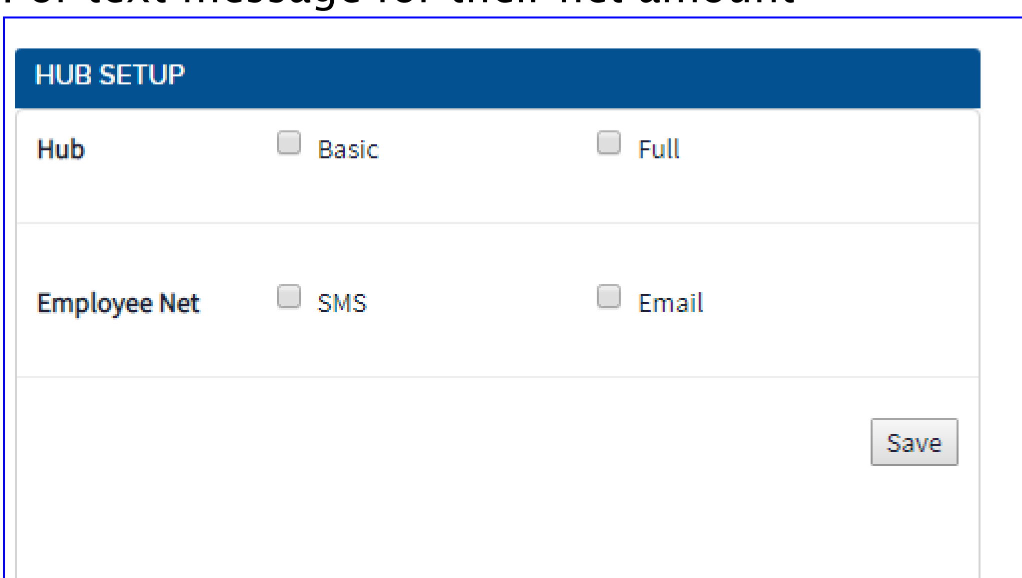


Additional Fields

-Memos: This field does not effect an employees net pay. IE: Safe Harbor Match-a memo that tells the employee that their employer is matching.

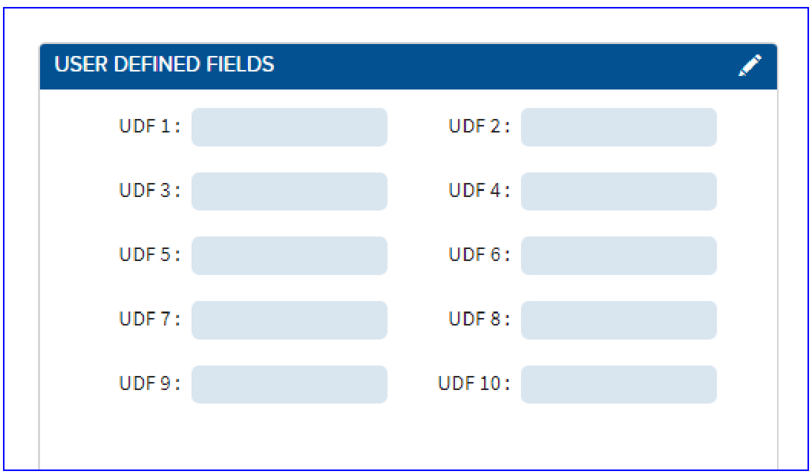


-HUB: Allows an admin to set up an employee for basic/full and an email or text message for their net amount

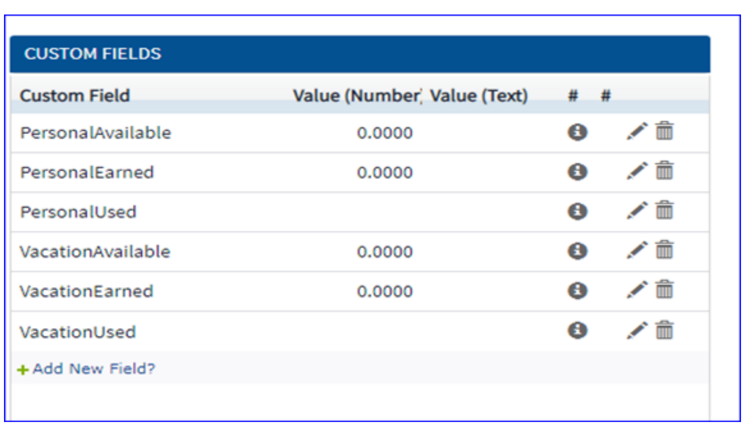


Additional Fields

- User Defined Fields: This feature can be used for what-ever tracking an employer would like to keep on an employee. IE: Parking lots/assigned spaces, an employer can request license plate #s to hold in that field. Any type of tracking the employer chooses can be used in this field.



- Custom Fields: Can track/change accruals



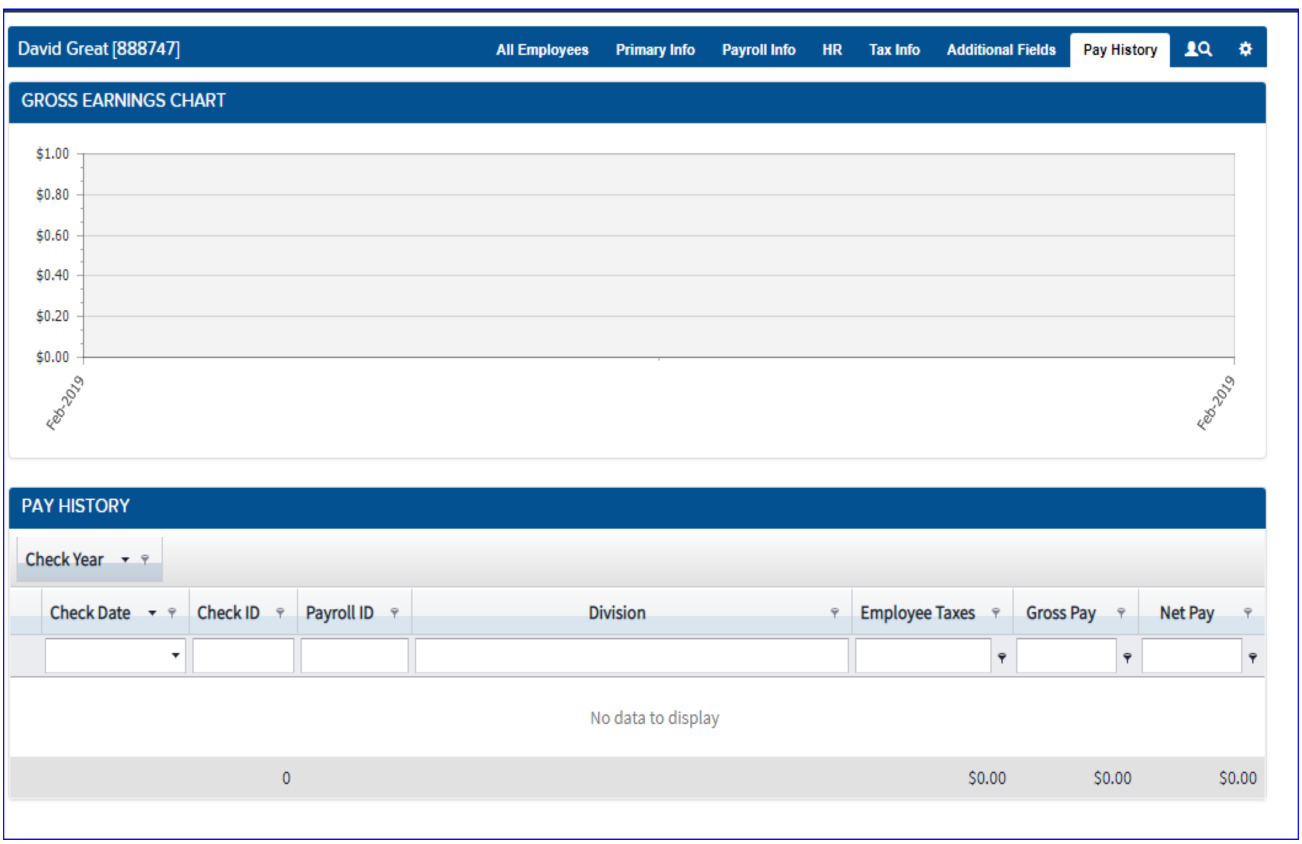
CUSTOM FIELDS

Custom Field	Value (Number)	Value (Text)	#	#
PersonalAvailable	0.0000			
PersonalEarned	0.0000			
PersonalUsed				
VacationAvailable	0.0000			
VacationEarned	0.0000			
VacationUsed				

+ Add New Field?

Pay History

- Employers can view gross earnings per employee, and their history of pay as well.



Notes

- You can also add a new employee when you select Employee along the top of the dash board. Your active list of employee will pop up to the right of the list you'll select +Add Employee and your quick set up box will appear.
- Also you can show terminated employees, sort by last name, first, department, division or employee ID
- You can search for employees by hitting the person and magnify glass and log off the system by hitting the cog wheel